

Thursday, August 04, 2016

Ringkasan Utama

- Snapshot Global:** Sentimen pasar terasa agak menguat kemarin dengan adanya stabilisasi harga minyak bumi dunia dan juga data AS yang mendukung. Data lapangan kerja ADP yang bagus kemarin menaikkan antisipasi pasar bahwa data resmi pemerintah yang akan keluar pada hari Jumat juga masih akan bagus dan mendukung sentimen pasar. Untuk hari kedepan, pasar akan mencermati rapat moneter Bank of England, di mana pasar mengantisipasi adanya pemangkasan suku bunga sebesar 25bps untuk mendukung perekonomian Inggris yang terganggu oleh Brexit.
- Indonesia:** Bank Indonesia menyatakan bahwa bank sentral tersebut masih terus melihat adanya kesempatan untuk menurunkan suku bunga kedepan, namun masih memandang situasi domestik maupun global sebelum beraksi. Sementara itu, Menkeu Sri Mulyani menyatakan bahwa pemerintah berencana untuk mengadakan revisi kepada target defisit APBN tahun ini, dari 2,35% PDB menjadi 2,5% mengingat lemahnya penerimaan pajak tahun ini.

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Analisa Sekilas

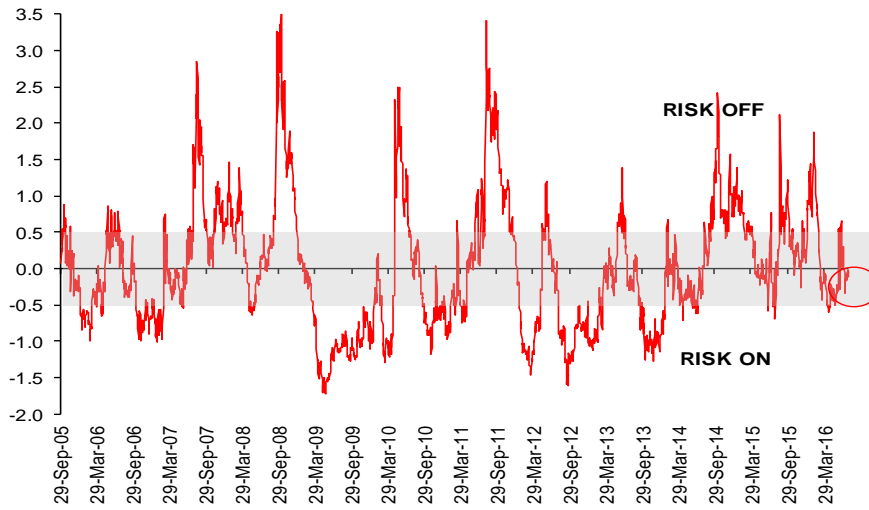
- FX:** USD bertengger di level yang tidak berubah banyak dengan tebalnya rasa antisipasi pasar terhadap data Nonfarm Payrolls pada hari Jumat ini.

Financial Market Indicators (Indonesia)

Nilai Mata Uang			Bursa Saham dan Komoditas			
USD-IDR	13121	EUR-USD	1.1149	Index	Nilai Indeks/Harga	Nett
EUR-IDR	14695.54	GBP-USD	1.3325	DJIA	18355.00	41.23
GBP-IDR	17520.49	USD-JPY	101.24	Nasdaq	5159.74	22.01
JPY-IDR	129.76	AUD-USD	0.7588	Nikkei 225	16083.11	-308.34
AUD-IDR	9966.3	NZD-USD	0.7159	STI	2827.58	-29.09
CAD-IDR	9999.81	USD-CAD	1.3067	KLCI	1648.50	-11.73
SGD-IDR	9785.47	USD-CHF	0.9732	JCI	5351.88	-21.45
MYR-IDR	3233.64	USD-NOK	8.4545	Baltic Dry	641.00	-4.00
JIBOR (Rupiah)			Obligasi Pemerintah (Govt Bonds)			
Tenor	Suku Bunga (%)	Tenor	Imbal Hasil (%)			
O/N	4.63	1Y	6.49			
1 Minggu	5.34	2Y	6.52			
1 Bulan	6.19	5Y	6.71			
3 Bulan	7.14	10Y	6.90			
6 Bulan	7.41	15Y	7.23			
12 Bulan	7.68	20Y	7.33			

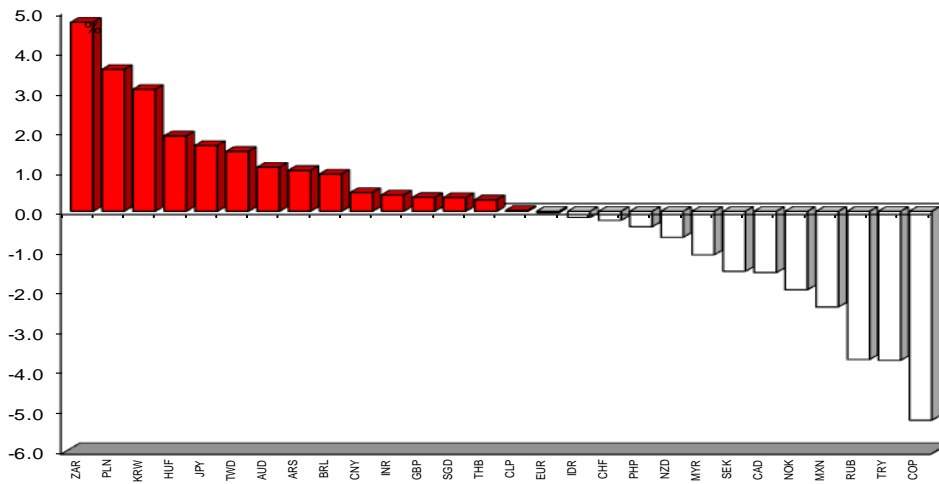
For reference only. Source: Bloomberg, OCBC Bank

FX Sentiment Index



Source: OCBC Bank

FX performance: 1-month change agst USD



Source: Bloomberg

Key Economic Indicators

Date Time	Event	Survey	Actual	Prior	Revised	
08/03/2016 05:00	SK Foreign Reserves	Jul --	\$371.38b	\$369.89b	--	
08/03/2016 09:00	NZ ANZ Commodity Price	Jul --	2.00%	3.70%	--	
08/03/2016 09:45	CH Caixin China PMI Services	Jul --	51.7	52.7	--	
08/03/2016 09:45	CH Caixin China PMI Composite	Jul --	51.9	50.3	--	
08/03/2016 10:00	JN Nikkei Japan PMI Services	Jul --	50.4	49.4	--	
08/03/2016 10:00	JN Nikkei Japan PMI Composite	Jul --	50.1	49	--	
08/03/2016 10:30	HK Nikkei Hong Kong PMI	Jul --	47.2	45.4	--	
08/03/2016 13:00	IN Nikkei India PMI Services	Jul --	51.9	50.3	--	
08/03/2016 13:00	IN Nikkei India PMI Composite	Jul --	52.4	51.1	--	
08/03/2016 15:30	TH BoT Benchmark Interest Rate	Aug-03	1.50%	1.50%	1.50%	--
08/03/2016 15:45	IT Markit/ADACI IT Services PMI	Jul 51	52	51.9	--	
08/03/2016 15:45	IT Markit/ADACI IT Composite PMI	Jul 52.4	52.2	52.6	--	
08/03/2016 15:50	FR Markit France Services PMI	Jul F 50.3	50.5	50.3	--	
08/03/2016 15:50	FR Markit France Composite PMI	Jul F 50	50.1	50	--	
08/03/2016 15:55	GE Markit Germany Services PMI	Jul F 54.6	54.4	54.6	--	
08/03/2016 15:55	GE Markit/BME GE Composite PMI	Jul F 55.3	55.3	55.3	--	
08/03/2016 16:00	SI Automobile COE Open Bid Cat A	Aug-03 --	52503	53000	--	
08/03/2016 16:00	SI Automobile COE Open Bid Cat B	Aug-03 --	57903	57508	--	
08/03/2016 16:00	EC Markit Eurozone Services PMI	Jul F 52.7	52.9	52.7	--	
08/03/2016 16:00	EC Markit Eurozone Comp PMI	Jul F	52.9	53.2	52.9	--
08/03/2016 16:30	UK Markit/CIPS UK Services PMI	Jul F 47.4	47.4	47.4	--	
08/03/2016 16:30	UK Markit/CIPS UK Comp PMI	Jul F 47.7	47.5	47.7	--	
08/03/2016 17:00	EC Retail Sales MoM	Jun 0.00%	0.00%	0.40%	--	
08/03/2016 17:00	EC Retail Sales YoY	Jun 1.80%	1.60%	1.60%	--	
08/03/2016 19:00	US MBA Mortgage Applications	Jul-29	--	-3.50%	-11.20%	--
08/03/2016 20:15	US ADP Employment Change	Jul	170k	179k	172k	176k
08/03/2016 21:45	US Markit US Services PMI	Jul F 51	51.4	50.9	--	
08/03/2016 21:45	US Markit US Composite PMI	Jul F --	51.8	51.5	--	
08/03/2016 22:00	US ISM Non-Manf. Composite	Jul	55.9	55.5	56.5	--
08/04/2016 07:50	JN Foreign Buying Japan Stocks	Jul-29 --	--	¥271.5b	--	
08/04/2016 09:30	AU Retail Sales MoM	Jun	0.30%	--	0.20%	--
08/04/2016 15:30	GE Markit GE Construction PMI	Jul --	--	50.4	--	
08/04/2016 16:10	GE Markit Germany Retail PMI	Jul --	--	51.6	--	
08/04/2016 16:10	EC Markit Eurozone Retail PMI	Jul --	--	48.5	--	
08/04/2016 16:10	FR Markit France Retail PMI	Jul --	--	51	--	
08/04/2016 16:10	IT Markit Italy Retail PMI	Jul --	--	40.2	--	
08/04/2016 19:00	UK Bank of England Bank Rate	Aug-04	0.25%	--	0.50%	--
08/04/2016 19:00	UK BOE Asset Purchase Target	Aug 375b	--	375b	--	
08/04/2016 20:30	US Initial Jobless Claims	Jul-30	265k	--	266k	--
08/04/2016 20:30	US Continuing Claims	Jul-23 2130k	--	2139k	--	
08/04/2016 21:45	US Bloomberg Consumer Comfort	Jul-31 --	--	42.9	--	
08/04/2016 22:00	US Factory Orders	Jun	-1.90%	--	-1.00%	--
08/04/2016 22:00	US Durable Goods Orders	Jun F	-4.00%	--	-4.00%	--
08/04/2016 22:00	US Durables Ex Transportation	Jun F -0.40%	--	-0.50%	--	
08/04/2016 22:00	US Cap Goods Orders Nondef Ex Air	Jun F --	--	0.20%	--	
08/04/2016 22:00	US Cap Goods Ship Nondef Ex Air	Jun F --	--	-0.40%	--	

Source: Bloomberg

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